Breaking New Ground

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What do I Need to Know About the Computer & Client Services?

WHAT DO I NEED TO KNOW ABOUT THE COMPUTER?

WIC uses **CIMS** software to provide WIC services. CIMS stands for **C**lient **I**nformation **M**anagement **S**ystem. This software has been developed for use exclusively in WIC clinics throughout Washington State. There are several applications within CIMS. In training and this booklet we will be focusing on the Client Services application only. We often refer to "CIMS" when discussing anything related to the software application used in Washington WIC clinics. The more specific and therefore correct term for the application used by clinic staff is Client Services. Be aware that you will hear and see the application called both CIMS and Client Services. Just remember: CIMS is the entire application and Client Services is the portion of the application used in local clinics by staff to serve Washington WIC clients.

Client Services uses menu choices, tabs, and wizards, so that staff can easily move through different computer screens & functions.

CIMS is a Windows based program.

Windows programs:

- Can have many screens (windows) open at a time. This allows you to have more than one client file open at a time.
- Windows programs also use icons. Client Services has its own icon & is opened "quick as a mouse" by double clicking on the icon.
- Use a Menu bar, Tool bar and Task bar that allow you to "navigate" and "execute" commands to your computer.

Wizards!

WIZARDS GUIDE YOU THROUGH CLINIC ACTIONS AND ARE AN EFFICIENT AND EASY WAY TO COMPLETE WIC SERVICES!

What is a Wizard?

The word "Wizard" is a computer term that is used to describe a feature of computer software that simplifies a process for you. For example, in Microsoft Word, a "Letter Wizard" walks users through the steps to writing a letter on the computer.

Wizards are used for many clinic actions because they have "tied" together the screens that are needed for various clinic actions. For example: the New Certification wizard (**NC wizard**) has a set of screens (also called tabs) that are needed when completing a New Certification.

Wizards always have these things in common:

- A **Custom tab** that is specific to the action – for example, on the HA custom tab, information is collected that is specific to the Health Assessment for infants.
- A **Finish tab** that tells the Wizard to save the information and document that the action and the appointment have been completed.

Magical!!

WHICH WIZARD IS WHICH?

Training, practice, experience and the following cheat sheets will help you know which CIMS Wizard to use!

P.S. To find a Wizard look under WIC Service on the Menu Bar!

Using Wizards

PRESCREEN – The Prescreen Wizard is used to determine if the client is income eligible and enter a minimal amount of client information. Upon completion of the Prescreen, the client receives a "pending" status. Pending clients may be taken into one of these three wizards, depending on their category.

- Prescreen → New Certification
- Prescreen → Presume Eligible (Pregnant Women only)
- Prescreen → Enroll Infant (used only for infants whose mother was on WIC during her pregnancy)

PRESUME ELIGIBLE (PE)- The PE Wizard is used to process a pregnant woman as "Presumed Eligible." Within the woman's 60-day eligibility period, staff should Complete (her) Certification.

Presume Eligible → Complete Certification

ENROLL INFANT (EN) – The EN Wizard is used to enroll an infant whose mother was on WIC during her pregnancy. Between 4-8 weeks, an infant would be scheduled a Complete Certification appointment so staff may complete the nutrition assessment and provide education and referrals.

Enroll infant → Complete Certification

Upon completing the WIZARD, staff may choose what service they would like to go to next depending on their clinic's flow of business. Additional options shown above are included when appropriate. Options available for most WIZARDS include the following:

- Wizard → Find Client
- Wizard → Checks
- Wizard → Flow Sheet – This is the default as it is the most common choice
- Wizard → Appt. Book

Now That You Have Reviewed the Wizards…

Spend some time watching and learning how your clinic runs.

Use the following checklist as your guide!

- View a Competent Professional Authority (a Certifier or RD in your clinic) providing a New Certification or Recertification from start to finish. Be sure to observe a client from each of the following client categories:
    - Pregnant
    - Breastfeeding/Postpartum
    - Child
    - Infant

- View one Health Assessment

- View one 2C (nutrition contact)

- View appointment scheduling process

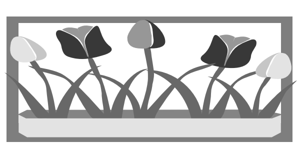
- View check pick-up appointments and check education

- With supervision, make appointments for clients and client groups

- With supervision, schedule clients for classes if they are offered in your clinic

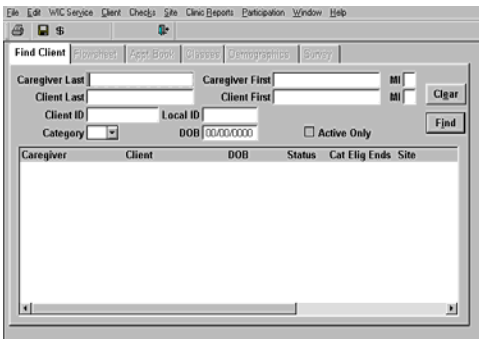
- View the end of the day process: No Show Management, Class Management, Appointment Summary Report, Client Activity Report

- View a mobile site if your clinic has one. Observe mobile site set-up if your duties will include going to mobile sites.



Note: Minimum recommended time spent observing and/or working is 10 workdays before coming to training!

The Find Client Tab



How do I find a client record?

Finding a client record is as easy as

1. Going to the FIND CLIENT tab.
2. Typing in a few letters of the caregiver or client last name.
3. Pressing the FIND button.

The **FIND CLIENT** tab is the client file cabinet for your clinic. Client records are stored in the computer and the FIND CLIENT tab gives you a variety of search fields to allow you access to those records.

Note: When identifying client statuses you may not see an RC in Process. Ask a staff person to show you this when a client has come in for a Recertification.

How do I search for a client?

The most common way to find a client is by searching for the **Caregiver's Last Name-** Enter 3 or 4 letters of a caregiver's last name into this field and press the Find button. The computer will search for all the people who match this criteria. **Note**: A pregnant woman can be a caregiver and a client at the same time!

Practice 1: Search for clients using some of the other fields on the FIND CLIENT tab:

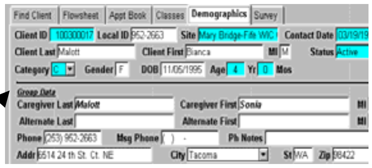
- **Client Last** – Find all the clients in your clinic that have the same first 3 letters in their last name as you do!
- **Category** – Search for all the women in your clinic who are Breastfeeding!
- **DOB** – Search for any client that has your birth date!

Practice 2: Using the information about statuses on the following page. Find a caregiver or client that has each of the statuses listed. See note at left.

Client Statuses

Active	A client who is Income and Risk Eligible with a current eligibility period.
Presumed	A pregnant woman who has been "Presumed Eligible" but who has not been certified. This client is eligible until the last day of the month in which the 60th day falls. A "Presumed Eligible" woman changes to an "Active" status after the certification has been completed.
Enrolled	An infant who has been Enrolled using the EN Wizard as a breastfeeding or formula fed infant but has not been certified. An Enrolled infant changes to an "Active" status after the certification has been completed.
Expired	A client who is past his/her eligibility period but has not been terminated from the program.
Pending	Some basic demographic information has been entered into the system using the Prescreen Wizard, but the client has not had a certification appointment (i.e., an applicant for WIC services). Checks may not be issued to pending clients.
Terminated	A client whose certification record has been terminated. Checks cannot be issued to Terminated clients.
RC In Process	A client who is in the process of being recertified for WIC. Once the Recert Wizard has been started, the client is in the "process" of being recertified. If the recertification is interrupted before eligibility has been determined, the client's status becomes "RC in Process". Staff needs to complete the recertification to make the client "active" again (providing the client qualifies as risk eligible.)

The Demographics Tab!



This line separates the Client information from the Group information

How do I enter personal information for clients?

The Demographics Tab can be used whenever a client name has been selected on the Find Client Tab!

The client information is entered above the black line on the screen and the group information is entered below the black line. The wonderful thing about the group information is when information is entered for one member of the group (like their address) the computer enters it into all records for that family!

To demonstrate your proficiency of the Demographics tab, Prescreen a client while being observed by someone in your clinic!

The Demographics tab is used to gather client information such as

- Date
- Name
- Category
- Birth
- Due date (PG only)
- Address & Phone

Practice:

With supervision and as situations allow, enter and change demographic information. Some practice activities could include:

- Updating addresses
- Changing phone numbers
- Documenting an alternate (an additional person authorized to receive & cash the client's WIC checks)
- Changing a client's or caregiver's last name
- Prescreening clients (completing as many fields on the Demographics tab, as time allows)

The Appointment Book

The Appointment Book is an easy way to schedule clients!

In addition to scheduling appointments…the appointment book also allows you to:

- Document when your client has completed their appointment.
- See what type of appointment your client is scheduled for.
- Change or edit a client's appointment.
- Find a client's "Next" appointment.
- Find the "Next available opening" for a client.
- See appointments for everyone in the group.
- Turn the page and return to "Today" at the click of a mouse!

During your training week you will have many opportunities to practice using all the features of the appointment book! Hands-on practice is an important (and fun) part of your training!

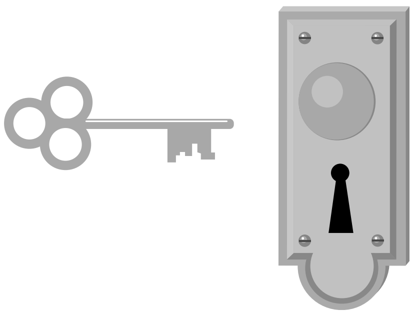
Before you come to training be familiar with the following:

- Which staff schedule appointments for clients.
- How long appointments should be scheduled for, based on type.
- How to make a new appointment for a client.

Before coming to training it is important to have hands on experience with the appointment book.

Ask your supervisor or co-workers to allow you to make new appointments for clients.

The Flowsheet!



The Flowsheet is a key to providing quality WIC services!

WIC staff use the Flowsheet to see the Past, Present and Future!

This is an exceptional talent! And, of course we are referring to the **client contacts** that can be seen on the Flowsheet! But as you can tell from observing staff in your clinic and reading this booklet, WIC staff are highly talented!

How to Use the Flowsheet

Find and highlight a client's name on the Find Client tab and you are ready to click on the Flowsheet tab! The Flowsheet is often the first place WIC staff start when determining what is planned for the client. The Flowsheet is important to determine:

- What is planned for the current month
- What is planned for future months of a client's eligibility period.

AND

The Flowsheet also shows you all this information for every member of the group!

Let's take a closer look at the Flowsheet:

- The History Section shows the type of WIC service that was provided for each client in a group in any given month.
- The Next Appointment Section displays the appointment the client is scheduled for and has not yet completed.
- The Careplan Section is where staff schedules "future" events – a time or date is not yet associated with these planned events.
- The Notes Section is used to write notes when you want to pass along information to other staff.

Appointment Types & Flowsheet Codes

Codes	Definitions
NC	New Certification-the first eligibility assessment for a client
RC	Recertification-subsequent eligibility assessments
HA	Health Assessment-required for infants between 3-9 months
F/U	Follow-up-scheduled when staff wants to follow-up on growth, hemoglobin, diet etc…
2C	Second Contact-an individual nutrition education contact
CL	Class-a group education contact
RD	Registered Dietitian-clients determined to be "High Risk" are scheduled for an appointment with the RD
PE	Presumed Eligible-pregnant women may be "Presumed Eligible" and given checks for 60 days prior to completing a certification appointment
EN	Enroll-infants of WIC moms (both breastfeeding and formula feeding) can be "enrolled" prior to completing a certification
CC	Complete Certification-the appointment following a PE for a pregnant woman or an EN for an infant to complete the assessment (certification)
TM	Terminated-clients are taken off WIC or "Terminated" when they are no longer eligible to receive WIC services.
TI	Transfer In-clients who are currently on WIC any where in the United States are eligible to transfer to any other clinic. A "Transfer In" appointment is made when the client requests to receive services in your clinic.
TO	Transfer Out-clients may request to "Transfer Out" if they are moving to another area. Clinic staff schedules this appointment to give the client eligibility documentation or a "Transfer Card"
RI	Reinstate-if a client has been terminated, but is still within a current eligibility period, they may be reinstated to continue to receive WIC services.
LS	Letter Sent-clients that have a "We missed You" letter printed have their file automatically "stamped" with an LS contact.
MC	Mailed Checks-clients that have a "Mailed Checks" letter printed have their file automatically "stamped" with an MC contact
CP	Check Pick-up-clients scheduled to pick up WIC checks have an appointment type CP.

Frequently Asked Questions About WIC Codes & WIC Appointments

1. How do I know when to Enroll (EN) an infant and when to do a New Certification (NC) for an infant?

If the infant's mom was on WIC during her pregnancy, you are allowed to use Enroll Infant (EN). New Certification (NC) is used for all other infants.

During the EN, minimal information is gathered and entered into the computer. Think of the EN as a temporary certification that needs to be completed at the next appointment. A Complete Certification (CC) is scheduled as the next appointment type. During the CC, the information that was not collected during the EN is gathered, such as measurements.

NC is used for infants whose mother was not on WIC during her pregnancy. This appointment includes measurements and a diet assessment to determine eligibility. Once the infant is determined eligible, checks can be printed if appropriate. If the infant is under 4 weeks at the NC appointment, it is recommended that a 2C (Second Contact) be the next appointment type. The 2C allows staff to check on the infant's growth, provide education, and follow up on breastfeeding.

2. Who sees the Registered Dietitian and why?

During an eligibility assessment some clients are determined to be "High Risk" or have a nutrition or medical reason that requires a visit to see the Registered Dietitian (RD). These appointments are generally 30-minute appointments and are scheduled as an RD in the Appointment Book.

3. How do WIC clients receive nutrition education?

Clients receive at least two nutrition education contacts during their certification period. There are many ways clients receive nutrition information.

- Nutrition education is an important part of all WIC certification appointments.
- Classes are generally scheduled for groups of clients with similar education needs. For example, "Feeding Your Baby from 4-8 months" would be a class attended by mothers with infants in that age group. Nutrition Education classes are scheduled in the computer on the "Classes tab".
- Nutrition education called a 2C (Second Contact) is provided when the client prefers or requires meeting individually, typically scheduled with a certifier.

4. Why do clients transfer in and out of WIC?

WIC clients are a generally mobile population. In WA we also have many military and migrant families that move often. A nice part of the WIC program is that it allows flexibility for clients to move or travel and still receive benefits at any WIC in the US, Guam, and WICO (WIC Overseas)…

Breaking New Ground
Beyond the Garden Gate

1. I have completed the checklist of observations. ☐
2. I have practiced entering information into the Demographics Tab. ☐
3. I have prescreened a client. ☐
4. I can schedule a new appointment using the Appointment Book. ☐
5. I am familiar with the codes used on the Flowsheet and Appointment Book. ☐
6. Write any questions you have or anything you would like to know more about during training: